

OFFICE OF SYSTEMS INTEGRATION

REQUEST FOR PROPOSAL OSI 7100-181 UNEMPLOYMENT INSURANCE MODERNIZATION PROJECT



SECTION 1 – INTRODUCTION AND OVERVIEW

June 1, 2007
Addendum 1

ISSUED BY:

STATE OF CALIFORNIA

DEPARTMENT OF GENERAL SERVICES
TECHNOLOGY ACQUISITIONS SECTION
707 3RD STREET, 2ND FLOOR
WEST SACRAMENTO, CA 95605

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1 Introduction and Overview

1.1 Request for Proposal (RFP) Purpose

The purpose of this State procurement, RFP OSI 7100-181 is to obtain the services of a systems integrator with proven experience delivering successful solutions for improved customer service delivery systems for the Unemployment Insurance (UI) Program and in the design and implementation of high volume multi-location call centers.

The sponsor agency for this effort is the State of California Employment Development Department (EDD). This initiative is named the Unemployment Insurance Modernization (UIMOD) Project.

The EDD executed a State interagency agreement with the Office of Systems Integration (OSI) to provide project management responsibility for this Project which includes managing day to day procurement activities and subsequent contract administration. The Department of General Services (DGS) has overall responsibility for conducting procurement activities for RFP OSI 7100-181 and all communications with Bidders.

The Project will develop a system with customer self service capabilities (telephone and the Internet) for continued claim certification and inquiries. This effort includes the redesign of the existing continued claims certification system to accommodate the new channels as well as the existing paper process. The new system will provide additional automated capabilities to reduce exception processing and manual intervention. In addition, the project includes the development of a system to mine and report on data across multiple information sources. This capability will aid in the identification of patterns and trends associated with fraud, and support business process improvement by providing better information on process quality and transaction volumes. The system will include specific functionality for fraud deterrence in the payment related functions. The Project also includes the implementation of a tool that enables the UI program staff to publish content to the EDD website without intervention by EDD technical personnel.

Further, the Project replaces the existing UI call processing infrastructure including hardware, software, the Local Area Network/Wide Area Network (LAN/WAN) components required to operate the call routing system and related applications. The number of call centers will increase from the current seven (7) to fifteen (15). The eight (8) UI Primary Adjudication Centers, the Insurance Accounting Call Center and the six (6) UI Claim Processing Centers will be configured as one (1) virtual call center, with a UI enterprise call center management information system. Two (2) new applications for the Interactive Voice Response (IVR) and Intelligent Call Management (ICM) will be developed to meet the business needs of the UI Program.

The developed System will be transitioned to the EDD for maintenance and operations after State acceptance.

This procurement will be conducted under the provisions of Public Contract Code Section 12102. Responses to this RFP will be evaluated based on best value to the State. Best value to the State is the proposal that best meets and potentially exceeds, the State's administrative and technical requirements at the most reasonable overall cost to implement and operate, with an acceptable level of risk. Bidders should carefully read RFP Section 9, Evaluation, to ensure an understanding of the evaluation process.

This procurement is also conducted in compliance with the Americans with Disabilities Act (ADA) as explained in Exhibit 1-1, ADA Compliance Policy. If a prospective Bidder has questions or requests pertaining to this compliance, contact the Procurement Official identified in RFP Section 1.4, Procurement Official.

The contract term for this procurement is estimated to be four (4) years from contract execution. The State reserves the option to exercise two (2) one (1) year extensions.

This procurement will result in an award to a single Contractor that can provide system integration services for this Project.

1.2 Scope and Vendor Admonishment

This RFP contains the instructions governing the requirements for a firm fixed-price quotation to be submitted by Bidders. This RFP also addresses the requirements that bidders must meet to be eligible for consideration as well as addressing the contractor's responsibilities before, during, and after implementation.

To increase the likelihood that Final Proposals will be received without disqualifying defects, this procurement will be comprised of a Bidders' Conference, Draft Proposal, Confidential Discussions, and Final Proposal. These steps are designed to: 1) assist Bidders to clearly understand the State's requirements before attempting to develop their final solutions; 2) ensure that the State clearly understands what each Bidder intends to propose before Final Proposal submission; and 3) give the State and each Bidder the opportunity to discuss weaknesses or potentially unacceptable elements of a Bidders proposal to give the Bidder the opportunity to correct defects before final submission of proposals.

IF A BIDDER EXPECTS TO BE AFFORDED THE BENEFITS OF THE STEPS INCLUDED IN THIS RFP, THE BIDDER MUST TAKE THE RESPONSIBILITY TO:

1. Carefully read the entire RFP.
2. If clarification of the RFP is necessary, submit questions in writing in a timely manner.

3. Submit all required responses, complete to the best of the Bidder's ability, by the required dates and times in the RFP Section 1.5, Key Action Dates.
4. Make sure that all procedures and requirements of the RFP are accurately followed and appropriately addressed.
5. Carefully reread the entire RFP before submitting the draft and Final Proposals.

1.3 Availability

The selected Bidder must have available all personnel, equipment and materials ready to begin work on the Contract Award date specified in RFP Section 1.5, Key Action Dates. If personnel offered by a selected Bidder leave the Bidder's firm or are otherwise unable to participate in this Contract, they must be replaced with equally qualified personnel who are accepted by the State.

1.4 Procurement Official

Questions concerning this RFP should be directed via email to the DGS Procurement Official listed below. The DGS Procurement Official will forward the questions to the UIMOD Project Office to coordinate written responses. All Bidders, who have submitted a Letter of Intent to Bid, will be notified, via email, of the questions and the respective responses without identifying the submitter(s). All correspondence, including questions, proposals, and requests for confidential discussions shall be directed to the Procurement Official:

John Marengo, Technology Acquisitions Specialist
Department of General Services
Procurement Division
707 Third Street, 2nd Floor
West Sacramento, CA 95605
Phone: (916) 375-5974 Fax: (916) 375-4505
John.Marengo@dgs.ca.gov

1.5 Key Action Dates

Listed below are the key activities, actions, dates and times by which the activities must be taken or completed for this RFP. If the State finds it necessary to change any of these dates, it will be accomplished via an addendum to the RFP.

ALL DATES AFTER THE SUBMISSION OF FINAL PROPOSALS ARE APPROXIMATE AND MAY BE ADJUSTED AS CONDITIONS DICTATE, WITHOUT ADDENDUM TO THIS RFP

	Action	Date
1.	Release RFP	3/23/07
2.	Last Day to Submit Questions and Have Answers Provided prior to Bidders' Conference	4/6/07
3.	Bidders' Conference , 722 Capitol Mall, EDD Auditorium, Sacramento, 95814, 9:00 AM – 12:00 PM	5/1/07
4.	Letter of Intent to Bid & Confidentiality Statement Due (by 5:00 pm PDT)	5/2/07
5.	Last day to request UI Operations Tour	5/9/07
6.	Begin UI Operations Tour(s)	5/16/07
7.	End UI Operations Tours(s)	6/13/07
8.	Last Day to submit questions for clarification of RFP and have answers provided prior to submittal of Draft Proposal	9/6/07
9.	Draft Proposals Due (by 5:00 pm PDT)	10/2/07
10.	Evaluation of Draft Proposals Begin	10/4/07
11.	Confidential Discussions on Draft Proposals Begin (Sacramento, CA)	11/27/07
12.	Last Day to submit questions for clarification of the RFP and have answers provided prior to Final Proposal due date	12/13/07
13.	Last Day to Request a change in RFP Requirements	1/4/08
14.	Last Day to Protest RFP Requirements ¹	1/31/08
15.	Last Day of Bidders' discussions with Department of Technology Services (DTS) Representatives	2/5/08
16.	Final Proposals Due (by 5:00 PDT)	2/20/08
17.	Evaluation of Final Proposals Begins	2/22/08
18.	Bidder Demonstrations Begin	4/28/08 *
19.	Public Cost Opening (Sacramento, CA) (time and location to be determined)	5/14/08 *
20.	Notification of Intent to Award	7/17/08 *
21.	Notification of Intent to Protest (by 5:00 pm PDT)	7/22/08 *
22.	Last Day to Submit Protest Details (by 5:00 pm PDT)	7/31/08 *
23.	Contract Award	12/18/08 *

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* Dates subject to change. Bidders will be notified via email only.

¹ Notwithstanding the fact that bidders will be allowed five (5) working days to submit questions and/or submit an "Initial Protest" with respect to each addendum released. See RFP Section 2.2.4, 2.2.6, and 2.4.1b.

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1.6 Bidders' Library

The State will maintain a Bidders' Library with the items listed in Appendix K, UIMOD Bidder Library List. Bidders will be able to download copies of electronic documents through the procurement website, <http://www.uimodrfp.ca.gov>.

All Bidders should review the Bidders' library documents and internet links.

To obtain access to the Bidders' Library, Bidders must submit a Letter of Intent to Bid and Confidentiality Statement to the Procurement Official in RFP Section 1.4. Upon receipt a Bidders' Library log on ID and password will be forwarded to the Bidder in two separate emails. The first email will contain the log on ID and the second email will contain the password.

1.7 Electronic Copy of RFP Available

An electronic copy of the RFP is available to all Bidders to assist with their preparation of the proposal and is available at the UIMOD Project Procurement website, <http://www.uimodrfp.ca.gov> in Microsoft Word 2000. Additionally, the cost spreadsheets are available in Microsoft Excel 2000.

The RFP sections posted on the website under the heading, "Current RFP Sections as of DATE (e.g., March 23, 2007)" comprise the official version of the RFP.

Addenda transmittal letters will be published on the website as needed along with a Portable Document Format (PDF) file of RFP pages including tracked changes to assist Bidders in identifying RFP modifications.

Bidders are cautioned that changing any RFP language in the Bidder proposal especially that language pertaining to RFP requirements and the Contract, is grounds for Bidder disqualification.

1.8 Unemployment Insurance Program Operations Tours

Tours of the UI Program operations will be arranged for Bidders with the intent to provide an opportunity to observe day-to-day activities and to assist with understanding the current business processes and the impact of proposed solutions. For a 30 day period, the State will schedule tours for Bidders on dates that will not be disruptive to UI operations. Bidders must request a UI Program tour by the date stated in RFP Section 1.5, Key Action Dates. Tours will be available for no more than two (2) individuals representing each Bidder. Bidders are responsible for scheduling the UI Program tours through the Procurement Official defined in RFP Section 1.4.

1.9 Department of Technology Services Discussions (State Data Center Services)

Bidders will be provided the opportunity to meet and discuss their solution approach with the Department of Technology Services (DTS) technical representatives to assist Bidders in understanding the data center's service offerings, rates, and constraints. These meetings will be conducted in a confidential manner for all Bidders. In general, the Bidder is responsible for requesting a meeting with the DTS through the Procurement Official defined in RFP Section 1.4. The DTS may also initiate discussions with Bidders through the Procurement Official. In either case, the State will confirm each appointment within five (5) days of the request. Depending on the availability of the DTS staff, the actual appointment date may be up to fifteen (15) State working days after the date of the request. The last day to have discussions with the DTS prior to the submittal of Final Proposals is defined in RFP Section 1.5, Key Action Dates.

During DTS meetings written notes may be made by both the State and the Bidder. There will not be an official transcript of the proceedings. If a Bidder has any outstanding issues or needs for clarification subsequent to a meeting, the Bidder is advised to contact the State Procurement Official in writing for resolution and/or clarification prior to the submission of the Final Proposal. Oral statements made shall not obligate either party.

EXHIBIT 1.1 – ADA COMPLIANCE POLICY

ADA Notice

Procurement Division (State Department of General Services)
**AMERICANS WITH DISABILITIES ACT (ADA) COMPLIANCE
POLICY OF NON-DISCRIMINATION ON THE BASIS OF DISABILITY.**

To meet and carry out the non-discrimination requirements of Title II of the Americans with Disabilities Act (ADA), it is the policy of the Procurement Division (within the State Department of General Services) to make every effort to ensure that its programs, activities, employment opportunities, and services are available to all persons, including persons with disabilities.

For persons with a disability needing reasonable accommodation to participate in the procurement process, or for persons having questions regarding reasonable accommodation for the procurement process, please contact the DGS Procurement Division at (916) 375-4400 (main office), the DGS Procurement Division TTY/TDD (telephone device for the deaf) or the California RELAY Service numbers listed below. You may also contact the DGS Procurement Official listed in RFP Section 1, Paragraph 1.4.

IMPORTANT: TO ENSURE THAT THE STATE CAN MEET YOUR ACCOMMODATION, IT IS BEST THAT YOUR REQUEST BE RECEIVED AT LEAST TEN (10) WORKING DAYS BEFORE THE SCHEDULED EVENT (i.e., MEETING, CONFERENCE WORKSHOP, ETC.) OR DEADLINE DUE DATE FOR PROCUREMENT DOCUMENTS.

The DGS Procurement Division TTY telephone numbers are:

Sacramento Office:	1-916-376-1891
Santa Ana Office:	1-714-558-3311

The California Relay Service telephone numbers are:

Voice:	1-800-735-2922
TTY:	1-800-735-2929